

Pre-Retiree Client Process

PROCESS REVIEW

(60 Minute Meeting)

1. Product Summary
2. Personal Introductions

INTRODUCTORY MEETING

(20-30 Minute Meeting)

1. Your Perspective
2. Introduction Presentation
3. Rough Populate the Blueprint
4. Set Next Appointment

PROTECTION

(60 Minute Meeting)

1. Protection Presentation
2. Complete Paperwork as Necessary
3. Set Next Appointment

WEALTH BUILDING

(3 Meetings – 60 minutes each)

Meeting #1

1. Wealth Building Cornerstones Presentation
2. Example Cornerstones Calculator™ Output
3. Complete Necessary Paperwork
4. Set Next Appointment

Meeting #2

1. Review Wealth Building Cornerstones Presentation
2. Personalized Cornerstones Calculator™ Outputs
3. Set Next Appointment

Meeting #3

1. Review Cornerstones Calculator™ Outputs as Necessary
2. Implementation of Desired Products
3. Set Next Appointment